Storyboard
Case Recordings – Private Provider

This storyboard demonstrates how to view, enter and edit Case Recording information in Family Cases for Private Providers

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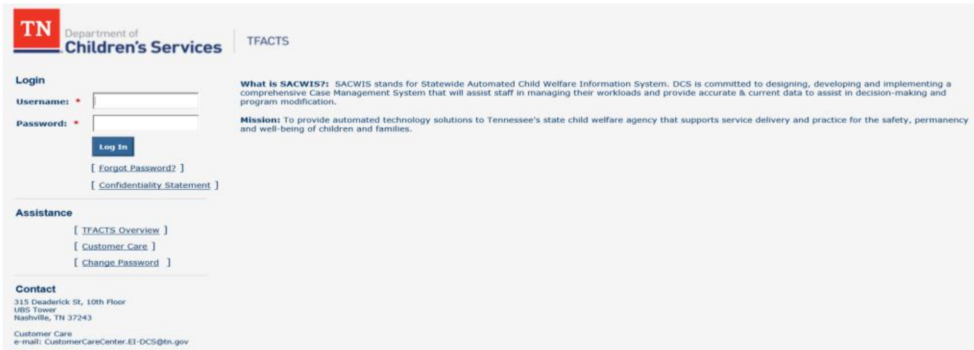
Navigating to the Screen

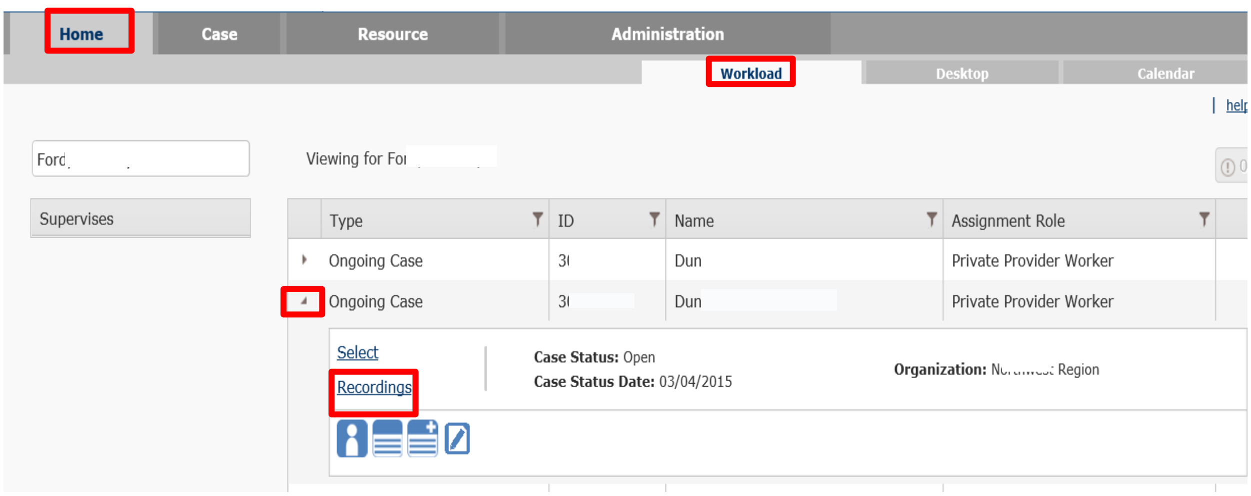
This screen will display when first accessing TFACTS.

Enter your **Username** (en number) and **Password** to log in.



The **TFACTS Home** screen/**Workload** screen displays listing all your assigned work items.

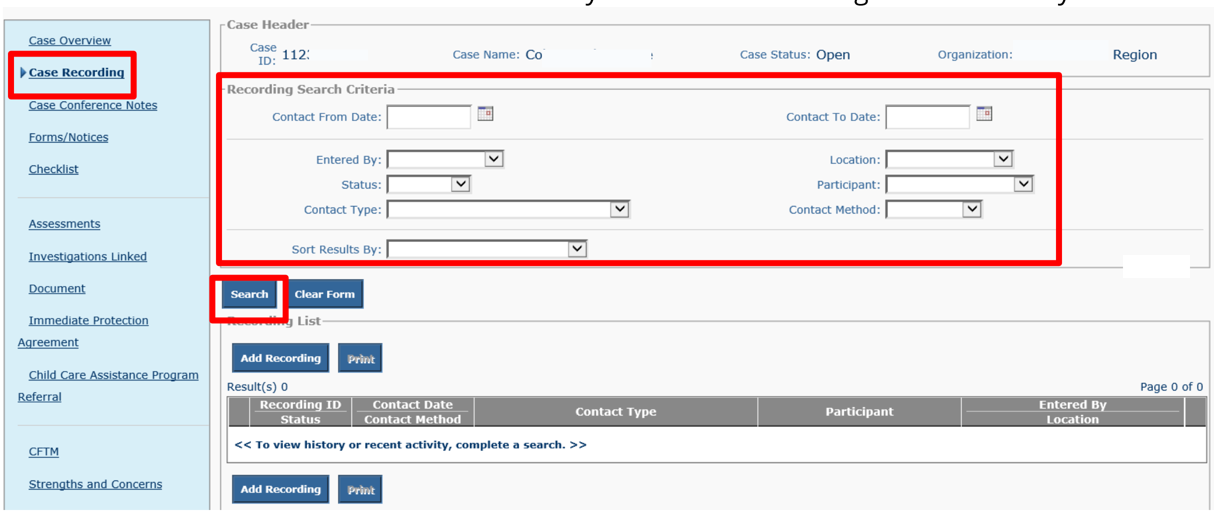
- Click the **arrow** corresponding to the child's **Ongoing Case.**
- Click the **Recordings** link.



- Notice that while on this page above, there are other quick links in blue below the Recordings link. If you hover your mouse over each of these quick links icons, it will give a description of where the icon will take you once you click on it. Monthly Summaries are no longer entered under Case Recordings.

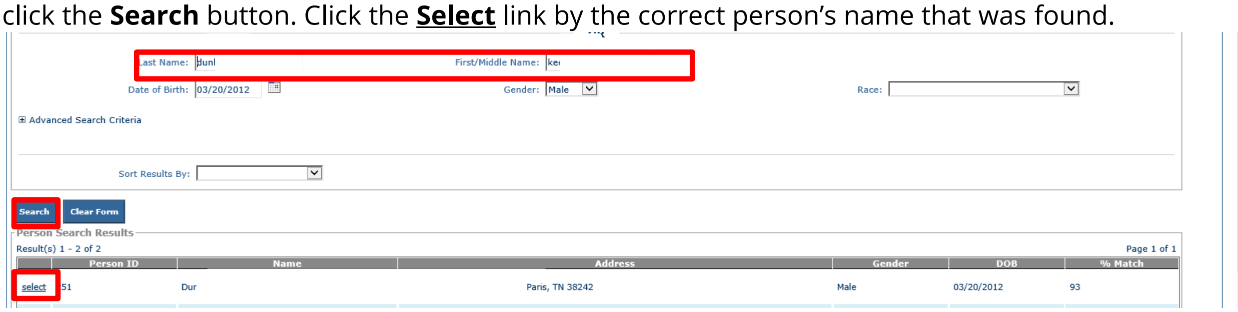
Once you click on the **Case Recordings** link, you will be taken to the **Case Recordings** module within the case.

- Click on the **Search** button to retrieve all case recordings.
- TFACTS will only display 500 case recording records at a time. If you cannot locate the case recording you are searching for, try entering additional search criteria to narrow down the results.
- Enter one or more search criteria values in the **Recording Search Criteria** box; then click the **Search** button. This will retrieve only a subset of recordings that matches your criteria.

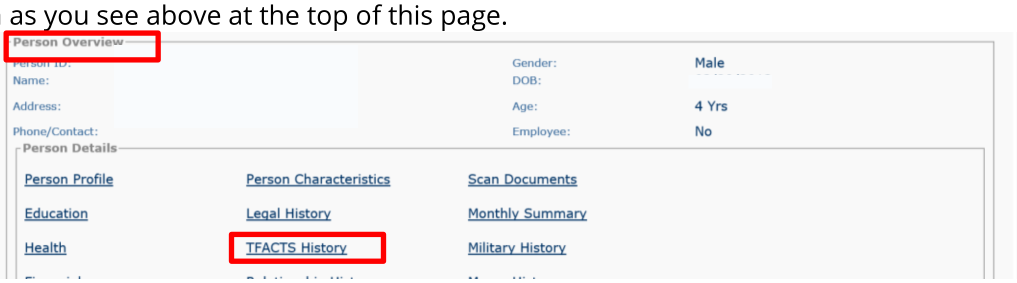


If the client is already on your workload, you can proceed from this point on to the next page.

NOTE: If the family case is not on your workload, you can perform a **Person Search**, using the **Search** option at the top of the TFACTS screen. Put in the person's name and/or other information, click the **Search** button. Click the **Select** link by the correct person's name that was found.

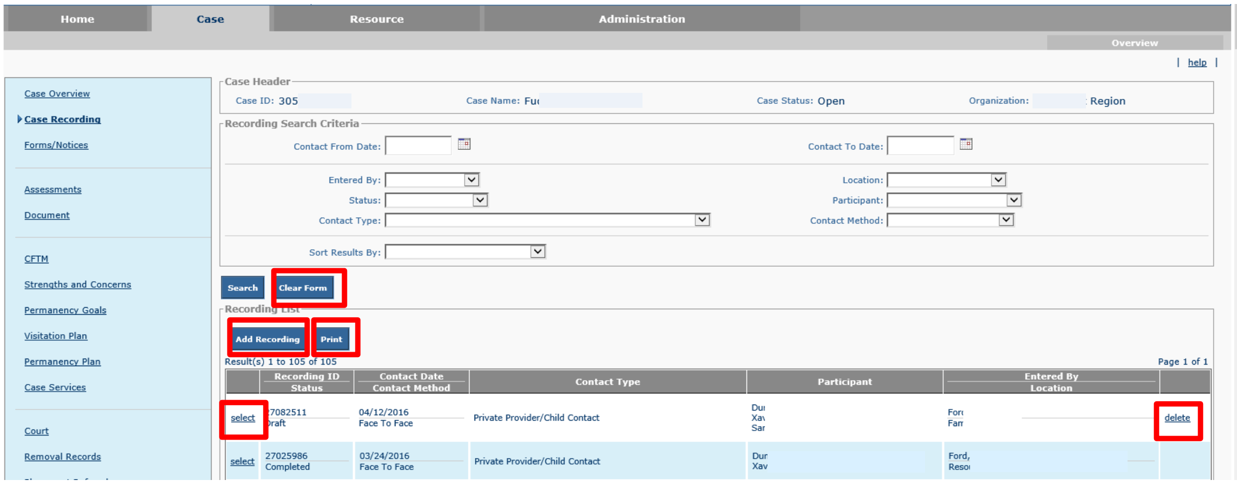


This will take you to the **Person Overview** screen, click on **TFACTS History** link, and then click on the **Case History** option. Click on appropriate case number under the **Case ID** column. This opens up the **Case Overview** screen. Click on **Case Recording** link and this will take you to the same screen as you see above at the top of this page.



Case Recording Options

The following **Case Recording** options below function the same for all case recording types.



- **Add Recording** – Click this button to create a new case recording. Clicking this button will open up the **Case Recording Detail** page for information to be entered.

- **Print-** Once you have executed the **Search** function to retrieve the desired recordings, the **Print** button will then become enabled. Clicking the **Print** button will open up the **Print** page that displays the list of case recordings that were returned in your search. You can choose to print all, or some, in this screen.

- **Clear Form**- This button allows you to clear all of your search criteria that you may have entered so you can begin a new search.

- **Select**– Click the **<u>Select</u>** link on a specific recording row to view/update the detail for that recording. The **Case Recording Detail** page of an existing recording will display.

- **Delete**– The **<u>Delete</u>** link is enabled only for recordings in **Draft** status. Click this link to **<u>Delete</u>** the recording. A recording that has been completed can only be **Marked In Error**, it cannot be deleted. We will discuss the Marked In Error function later in this storyboard.

NOTE: Only the creator of the recording and workers with **Case Recording Delete** security profile shall have the ability to delete a case recording via the **<u>Delete</u>** hyperlink.

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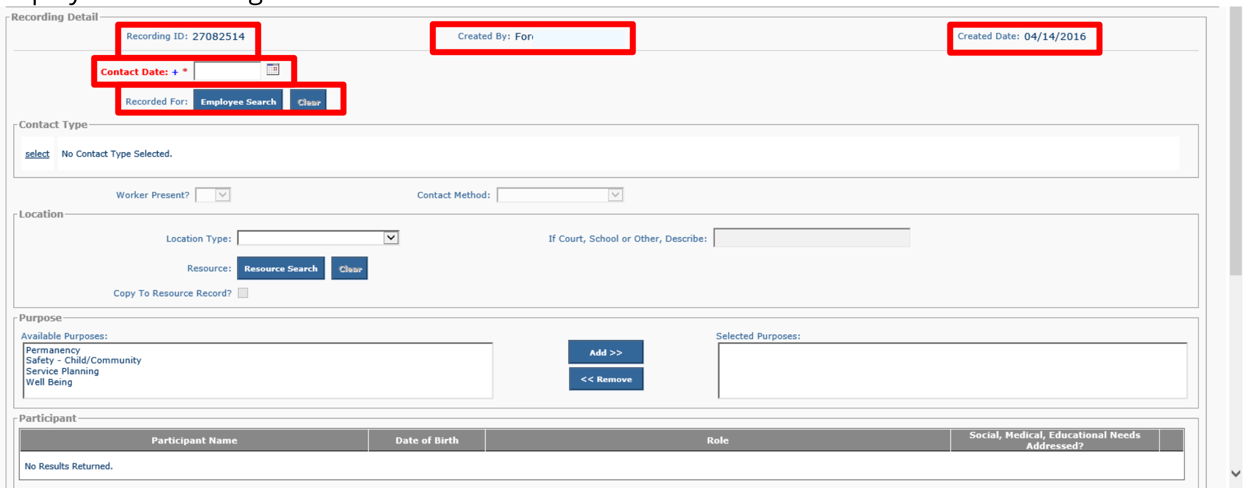
Entering a Case Recording

Once you have clicked on **Add Recording** button, it brings up the **Recording Detail** screen. It displays the following information:



- **Recording ID number**- Each recording is given a specific identification number upon entry that helps to identify it.
- **Created By-** Auto-populates the name of the person that is entering the recording.
- **Created Date**- Auto-populates as the date the recording is physically entered.
- **Contact Date** field**-** Enter the date the contents of recording actually occurred. You cannot move forward with the recording until a Contact Date has been entered.
- **Recorded For-**If you are entering a recording for someone else, you can click on the **Employee Search** field and pick the appropriate employee from the search results.

Once you have entered a **Contact Date**, you are now ready to enter a **Contact Type**. On the next page are the various examples of **Contact Types** for Private Providers on a family case.

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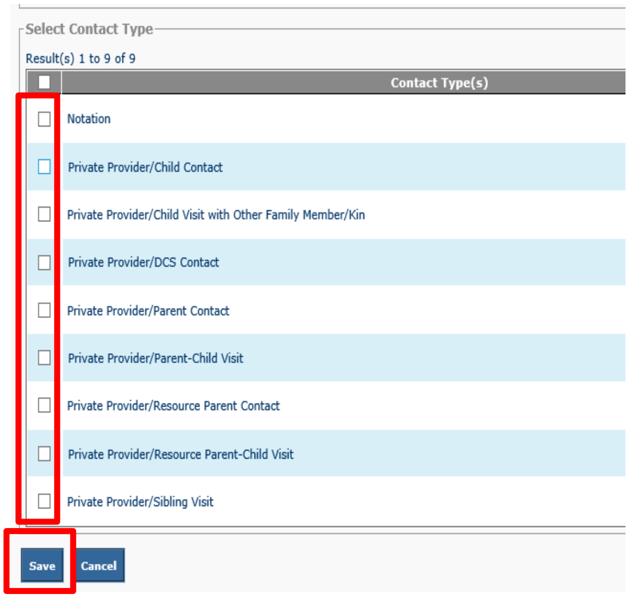
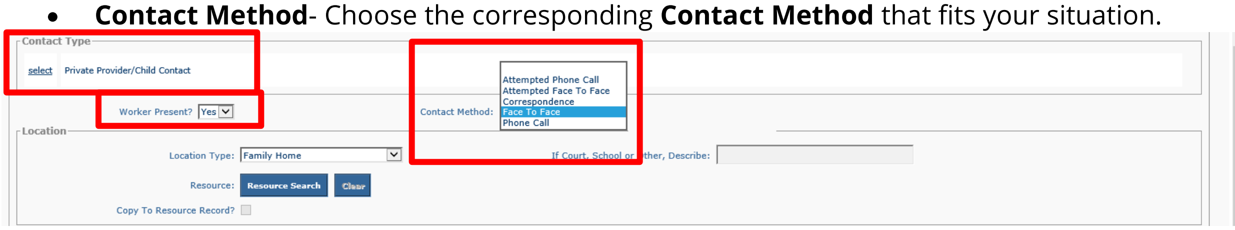
Adding Contact Types, Methods and Locations

Contact Types for Private Provider staff in a Family case.



- **Contact Type**-Check the box(es) beside the **Contact Type** (or types) that apply. Multiple contact types can be chosen.
- Once your **Contact Type(s)** are chosen, click **Save**. You will be returned to the **Recordings List** screen.
- **Worker Present?-** This field has a drop down of **Yes** or **No**. This field will be disabled depending on some **Contact Types.**
- **Contact Method**- Choose the corresponding **Contact Method** that fits your situation.



- **Location Type**- Choose the corresponding **Location Type** that fits your situation. **If Court, School**, or **Other** location type is chosen, you should describe the location in the field provided to the right of the **Location Type** field.

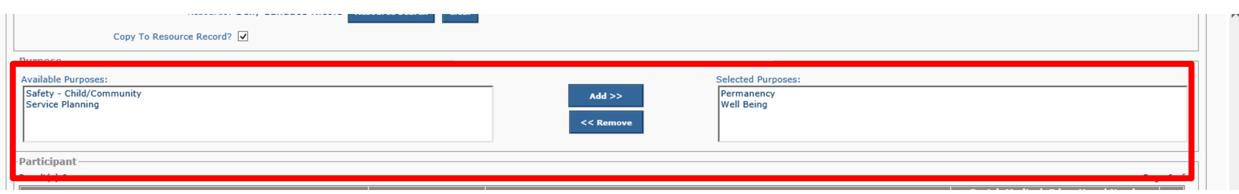
NOTE: Location Type is required if the **Contact Method** is **Face to Face**.

- If **Resource Home** is the **Location Type**, you will click the **Resource Search** button and locate the **Resource Home** where the visit occurred, click **<u>Select</u>** by the appropriate Resource Home to bring it back to the **Recordings Detail** screen.

- Click the check-mark field by the **Copy To Resource Record?** field if you would like the recording to carry over to the **Resource Home Activity Log**.

At the bottom portion of the **Recording Details** screen are the remaining fields that must be completed.

- **Purpose**-Select the **Purpose(s)** that apply to this recording in the **Available Purposes** box, click on the **Add>>** button to move to the **Selected Purposes** box on the right.



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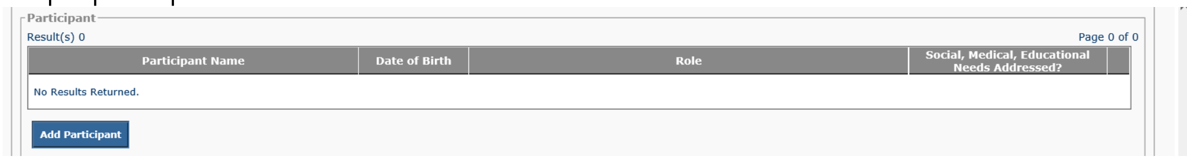
Adding Participants

Click on the **Add Participant** button and it will take you to the following screen where you can select multiple participants.



- **Child Present**- This list will display children to choose to show if they were seen during this recorded visit. **Tip:** Child might not show up as a **Child Present** if they are missing a date of birth.

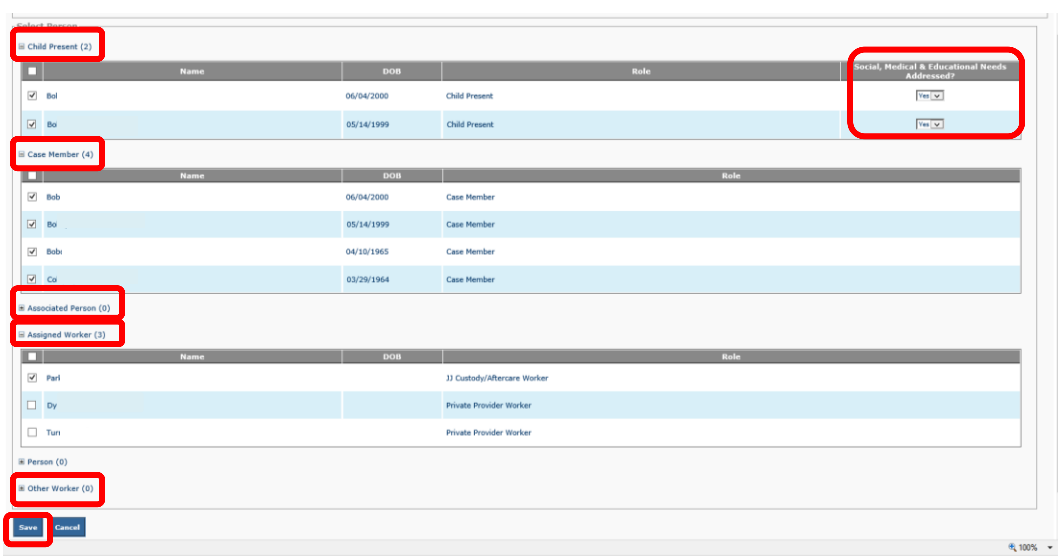
- **(SME) Social, Medical, & Educational Needs Addressed?-**Click **Yes** or **No** as it applies, if one or more of these were discussed during the visit.

- **Case Members-** Lists all persons that are displayed on the Case Member tab within the family case. Check-mark those members that were present at the visit.

- **Associated Person**- Lists all persons that are displayed on the Associated Persons tab within the family case.

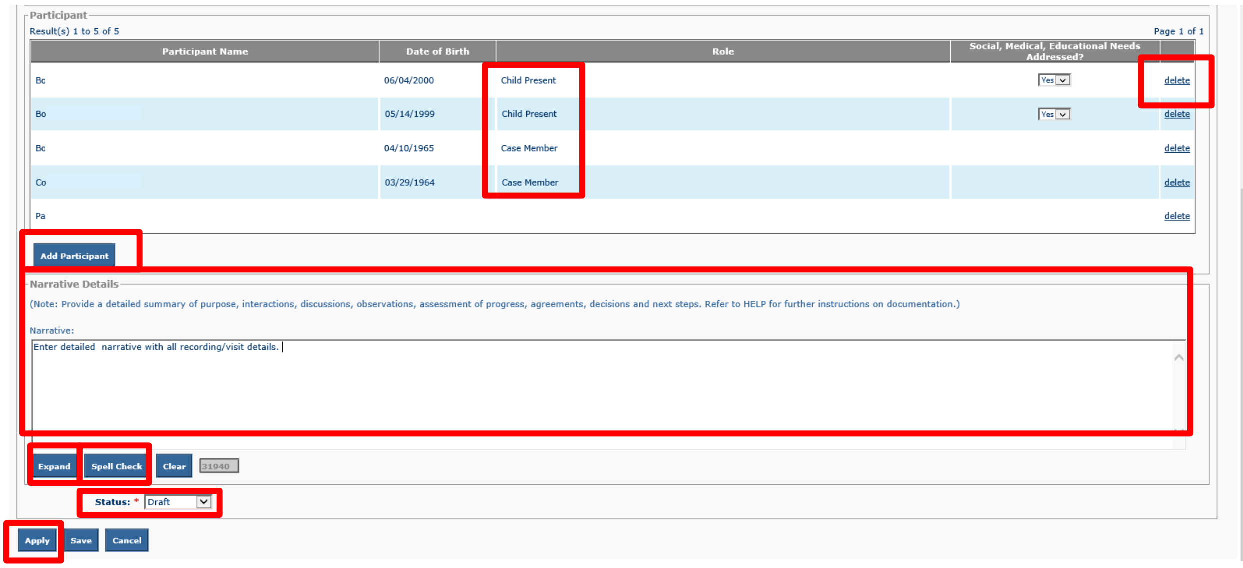
- **Assigned Worker-** This list will display all assigned workers at the date/time of the Contact Date.

- **Other Worker-** If you do not show up as an assigned worker and are assigned to the case, you can go under the **Other Worker** tab, initiate a person search to locate your name. Click on **Select** by your name to add yourself as a Participant to the recording. This can be used to also add **DCS Staff** workers that were present.



- Click **Save** to return to the **Recording Details** screen.
- Back on the **Recording Details** screen, you can see the list of **Participants** and their **Roles**.

You can delete any **Participants** that were added in error by clicking on the **Delete** link. If you need to add additional **Participants** at this point, you can still click on the **Add Participants** button while the recording is in **Draft** status.



- **Narrative-** Currently, for Private Providers, a detailed narrative is not required.
- Click **Apply.**

NOTE: If you click **Save** instead of **Apply**, it will return you to the **Recording List** screen. You will have to click on **Select** link by the recording to return to the **Draft** status recording.

- **Expand** button- This button expands the narrative section to a full screen.
- **Spell Check** button-Select your narrative section and click on the **Spell Check** button for any spelling errors.

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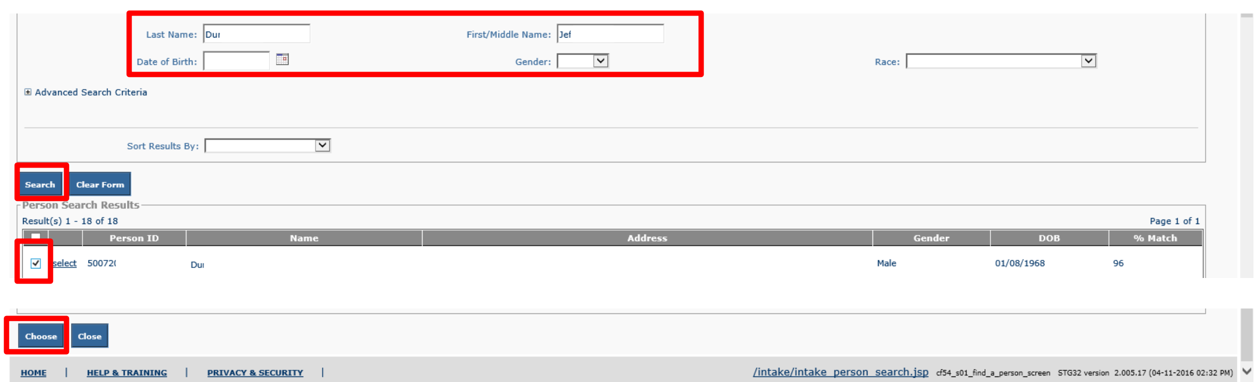
Adding Additional Persons to Participants

If you wish to add an additional **Participant,** and your recording is still in **Draft** status, use the following steps.

- Click the **Person** (+) expand button.
- Click on the **Person Search** button, it will take you to the **Person Search** screen.

- Put in the person's name (and any other information you may have), in order to perform a search.
- If the person if located in the **Person Search Results** list, check-mark the box by the person's name. Click on the **Choose** button at the bottom of the screen.



- Once you click on the **Choose** button, the person chosen will be listed in the **Participants** list; you will be required to add a **Role** to that person from a drop down of choices. Click **Save.**

- If the person is not an existing person, contact the regional FCCR to add them as a person under the **Case Member** tab. The person will appear under Case Members in your recording.

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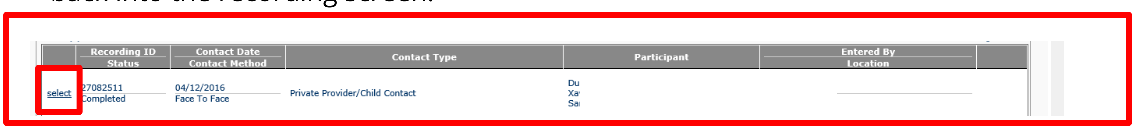
Completing the Recording

- The recording defaults to **Draft** status until it's marked as **Completed**. In order for a case recording to be a viable entry, it must be marked as **Completed**.

- At the bottom of the recording under the **Status** field, click on **Completed** to finish the recording. Then click **Save**.

- Once the recording has been marked as **Completed**, you can view it on the **Recording List** screen. Notice the **Delete** link is no longer available. You can click on the **Select** link to go back into the recording screen.



- **System Completed**- If the worker waits beyond thirty days to mark the recording as **Completed;** it will be **System Completed** for them. If this happens, any information in the recording is no longer valid. If it's a face to face recording, the visit will not be counted in face to face reports. Below is a list of three such recordings that were not completed before time ran out. Notice the **Recording ID/Status column**. These recordings are now invalid.

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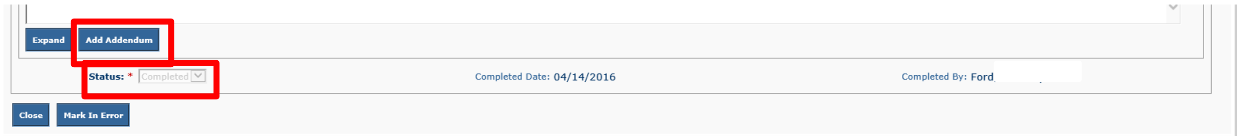
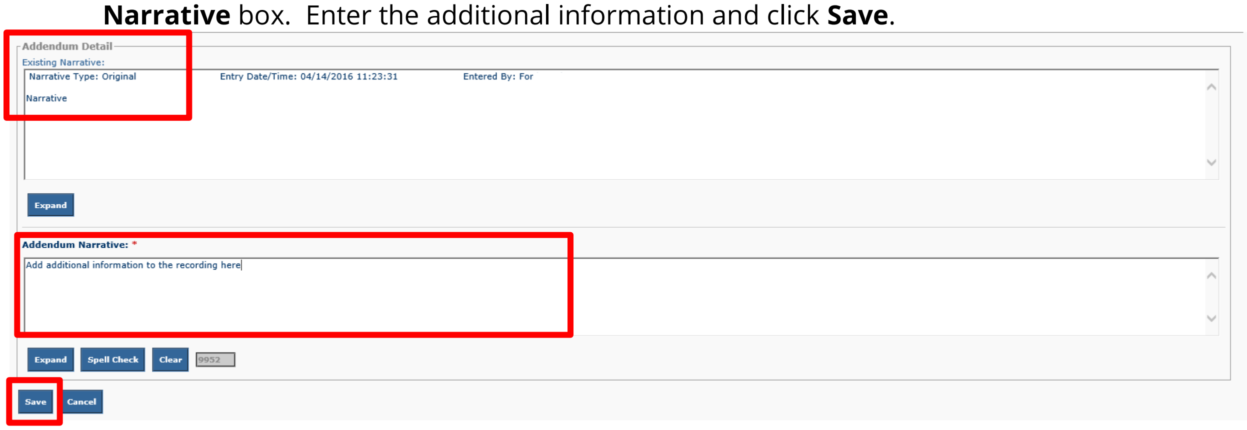
Adding an Addendum to a Completed Recording

Once a recording is marked as **Completed**, an Addendum can be added.

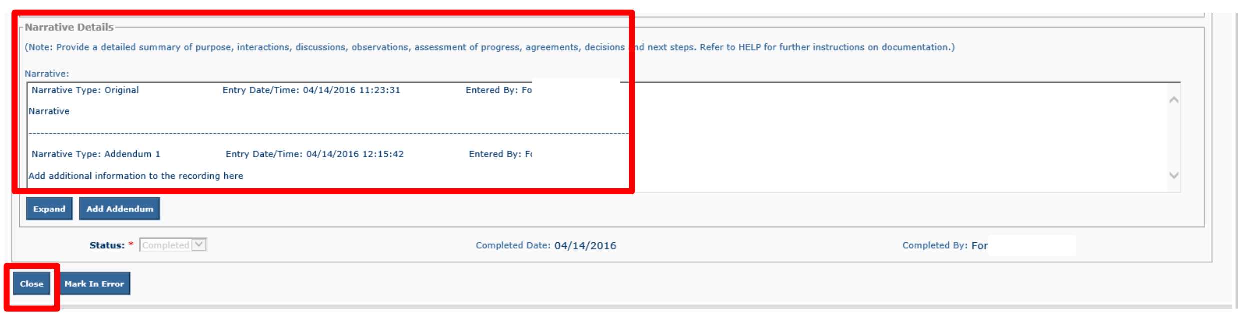
- Locate the recording, click on the **Select** link by the desired recording as shown on the previous page. At the bottom of the recording, click on the **Add Addendum** button.



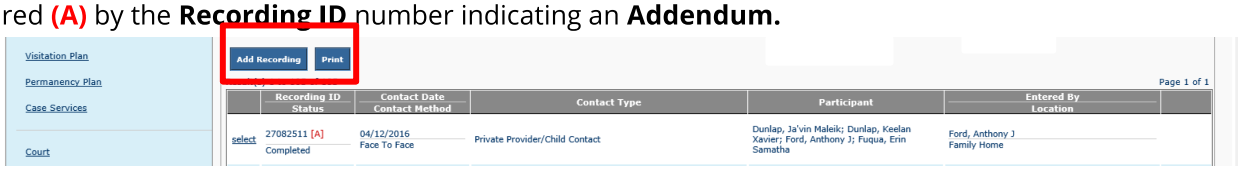
- You will be taken to the **Addendum Detail** screen where you can view your original narrative at the top of the screen. At the bottom of the screen you will see the **Addendum Narrative** box. Enter the additional information and click **Save**.



- You will be returned to the **Narrative Details** screen where you can view the additional narrative at the bottom of the page, it is listed as **Addendum 1**. Click **Close**.



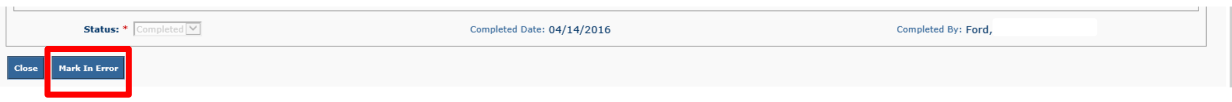
- Once you close the recording, you are taken to the Recordings List screen where you will see a red **(A)** by the **Recording ID** number indicating an **Addendum.**



Mark in Error

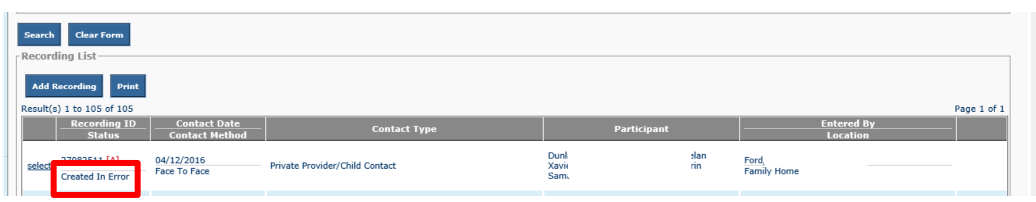
Although you cannot **Delete** a **Completed** recording, you can use the **Mark in Error** function to show that it was created in error.

- Navigate to the case recording you would like to **Mark in Error**. Click on the **Select** link by the recording entry. Scroll to the bottom of the recording screen.
- Click on the **Mark in Error** button.



- The **Mark In Error Detail** screen appears. Enter an explanation as to why this recording should be marked in error in the required narrative box.
- Click **Save**.

- The recording now displays as **Created in Error** in the list of recordings.



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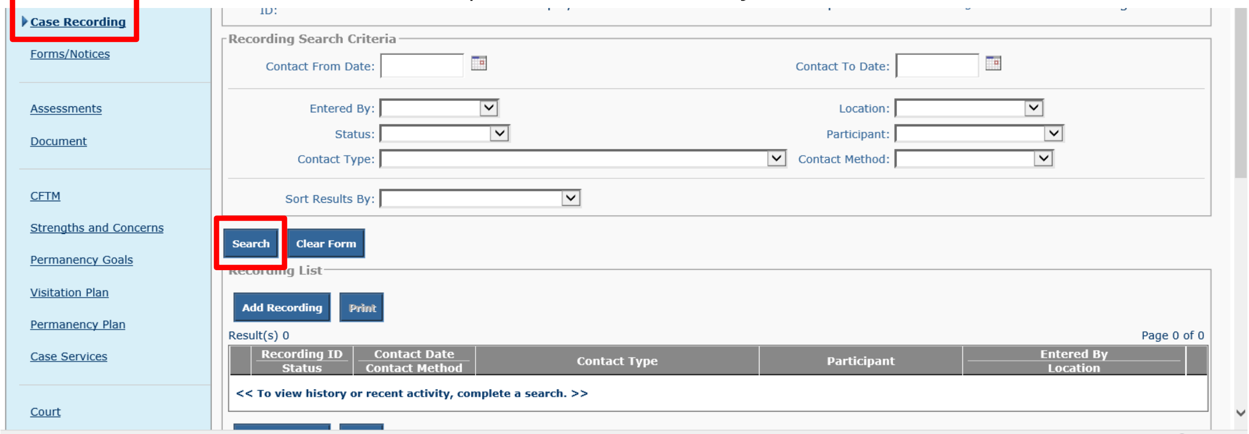
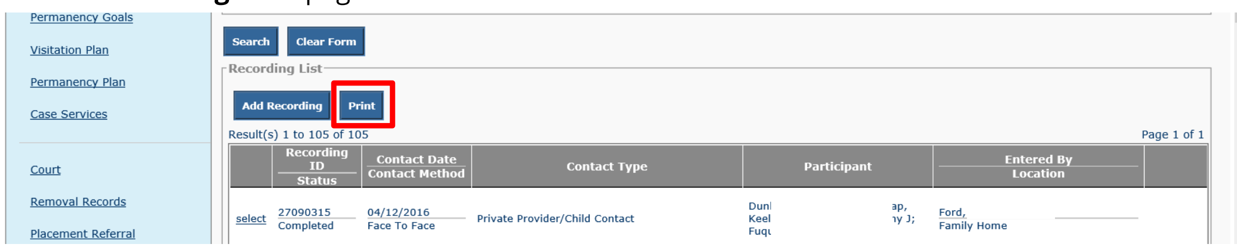
Printing Case Recordings

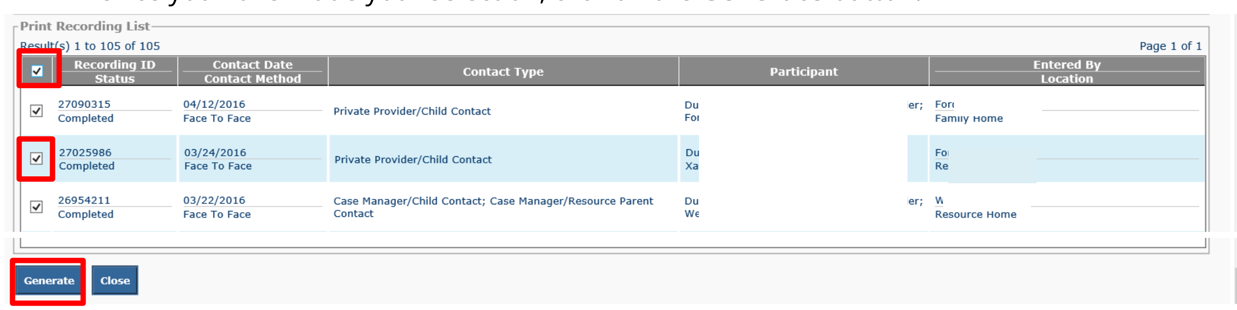
- In the **Case Recordings** screen, click on the **Search** button to bring up all case recordings. Notice that the **Print** button option is disabled until you click on **Search**.



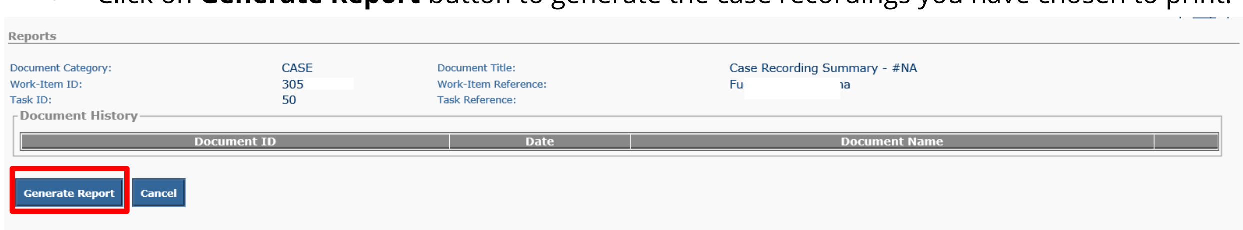
- Once all results have returned, the **Print** button is enabled. Click on it to bring up the **Print Recordings List** page.



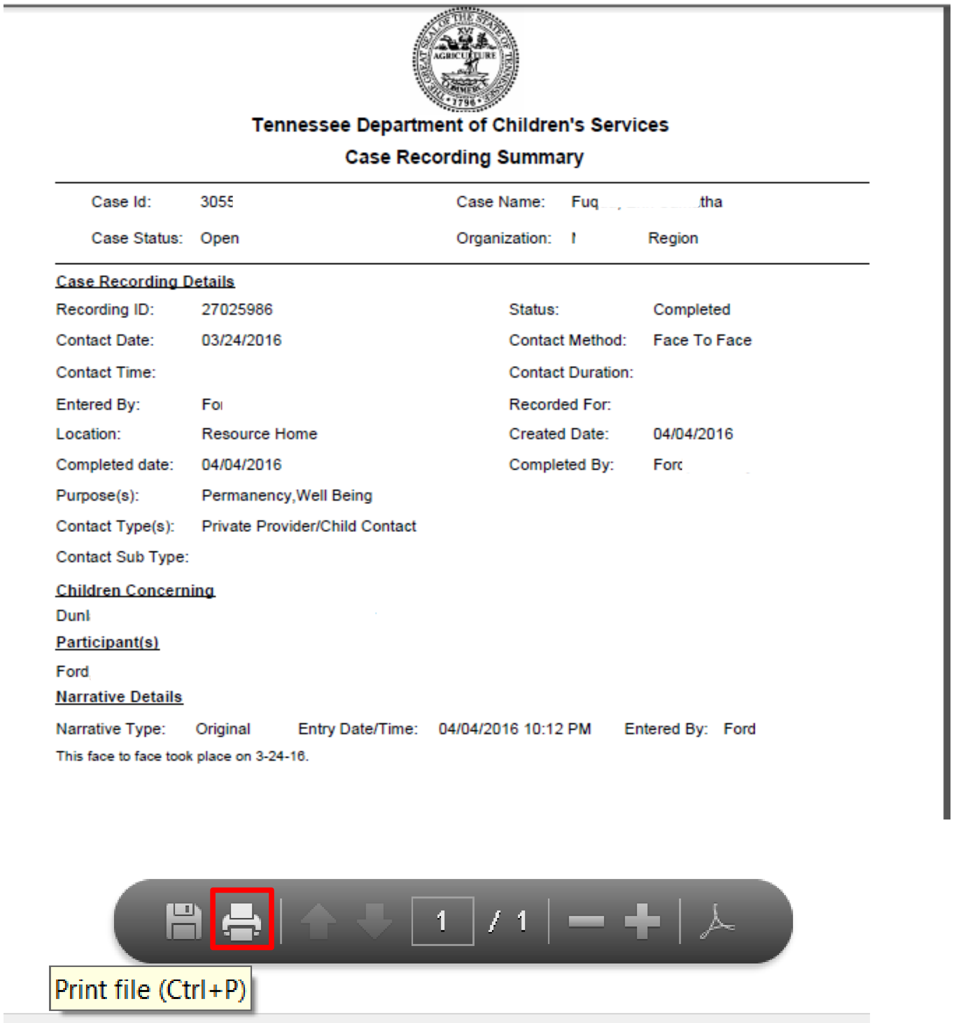
- You can checkmark the check at the top of the list to automatically check **all** recordings to print, **OR** you can checkmark a single line's check-box for only one (or more) recording(s) to print.
- Once you have made your selection, click on the **Generate** button.



- Click on **Generate Report** button to generate the case recordings you have chosen to print.



- An example of a printed recording is below. To print, hover at the bottom of the page and click on the **Print** Icon.



Tennessee Department of Children's Services
Case Recording Summary

Case Id:	3055	Case Name:	Fuq tha
Case Status:	Open	Organization:	I Region

Case Recording Details

Recording ID:	27025986	Status:	Completed
Contact Date:	03/24/2016	Contact Method:	Face To Face
Contact Time:		Contact Duration:	
Entered By:	Fo	Recorded For:	
Location:	Resource Home	Created Date:	04/04/2016
Completed date:	04/04/2016	Completed By:	Forc
Purpose(s):	Permanency,Well Being		
Contact Type(s):	Private Provider/Child Contact		
Contact Sub Type:			

Children Concerning
Dunl
Participant(s)
Ford
Narrative Details

Narrative Type: Original Entry Date/Time: 04/04/2016 10:12 PM Entered By: Ford

This face to face took place on 3-24-16.

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Frequently Asked Questions

Q. WHY ENTER FACE-TO-FACE (F2F) CONTACTS?

A. Best practice, and the goal of attaining permanency for children, dictates that every child-welfare entity, either the Department or a member of the private provider community, ensures those children experience consistent, **face-to-face** contact and visitation with parents, siblings, extended family and private provider clinical staff (when being served by a private provider). These visits and contacts are critical to family engagement and help ensure a seamless integration for the child when transitioning from custodial care to reunification and permanency.

Q. HOW CAN WE EFFECTIVELY RECORD AND TRACK THOSE CONTACTS?

A. The Department has been mandated to track all **face-to-face** contacts to ensure compliance. This tracking must be accomplished by some means other than "pen and pencil" documentation. The ability of private providers to enter these contacts directly into TFACTS is the mechanism by which these occurrences will be tracked.

Q. HOW DO WE MAKE THIS HAPPEN?

A. Designated staff members from provider agencies will be given access to TFACTS and those staff members will enter this F2F contact information.

Q. WHAT ACTUALLY CONSTITUTES A FACE-TO-FACE CONTACT

A. Face-to-Face Contact with Child or Youth - This is used when a person directly involved in private provider case management makes actual, physical face-to-face contact with the child or youth. ***This contact will be called Private Provider/Child Contact in TFACTS.***

Family/Sibling/ResourceParent Visitation Face-to-Face Contact - This is used when the child or youth visits with a sibling or other family member (such as a parent or other relative) and a private provider case manager or other case management staff who meet the requirements for face-to-face are also present for the visit.

You have now completed this storyboard.